

AGENDA
CORE CASE MANAGEMENT/DOCUMENT IMAGING
Track Committee
July 30 & 31, 2007

Monday, July 30th

9:00 a.m. **Participant Introductions**

9:15 a.m. **Overview – Karen Nelson**

- Pilot Project Recap
- Committee Goals Discussion
- Session Approach – Brenda Marks

10:00 a.m. **FullCourt and Document Imaging Demonstration/Gap Identification**

- **Case Numbering**
- **Searching**
- **Party Records, Aliases**
- **Creating Criminal Case**
 - Party Search
 - Case Creation
 - Random Judge Assignment
 - Entering Bonds
 - Entering Attorneys
 - Filing/Scanning of original charging document
 - Overview of Register of Actions
 - Scheduling Hearings
- **Action on Existing Criminal Cases**
 - Overview of Disposition window
 - Clerk of Court Disposition Action
 - Judicial Assistant Disposition Action
 - Criminal Judgment Document Creation
- **Creating a Civil Case**
 - Civil Filing, Fees
 - Adding Parties
 - Receipting Filing Fee
 - Case Created
 - Enter Attorneys
 - Filing/Scanning of original document
 - Scheduling Hearings
 - Attaching Minutes (documents)
 - Overview of Register of Actions

➤ **Creating Marriage License**

- Civil Filing
- Adding Parties
- Receipting
- Bride and Groom Designation
- Adding Marriage application information

➤ **Actions on Existing Civil Cases**

- Marriage License after Marriage Complete
- Clerk Document Retrieval
- Civil Judgments
- Civil Judgment Events
- Judgment Book Report
- Child Support Trust

➤ **Hearings Calendar Management**

- Judges Calendars
- Master Calendar
- Hearings Management
- Calendar Printouts

➤ **Reports**

- ROA report filtered by document ID
- Register of Criminal Actions
- Register Log Report
- Judgment Index Report
- Judgment Book Report
- Judgment Book Report (Case Level)
- Docket (transcript of judgment)
- Index Report Plaintiff
- Index Report Defendant
- Marriage License Reports
- Civil Trust Reports
- Statistical Reports
- Media Disposition Report

➤ **Financials**

- Financials Cash Courts
- Financials With General Ledger
 - Receipting (Cash, Check, Money Order)
 - Receipting with Restitution
 - End of Day Balancing
 - Financial Reports
 - Bank Reconciliation
 - Month End – End of Period Disbursement

➤ **Bells/Whistles and Miscellaneous**

- File Locator
- Reminders

➤ **Public Security and Access**

- Searching
- Public – No Access to Sealed Cases
- Public View of Party Details
- Public View of Images/Documents (not sealed)
- Public – No Access to Sealed Documents
- Public View of Civil Judgments

3:30 p.m.

Re-Cap of Demonstrated Functional Requirements and Identified Gaps

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July 31

Tuesday, July 31th

9:00 a.m.

Review Standard Table Setup and Configuration Process

- Demonstrate State Standard Setups
- Inactivity Dismissal Setup (no current implementations)
- Review Security Configuration
- Validate Setups and Identify Gaps

11:00 a.m.

Review and Standard Table Values FullCourt and Document Imaging

- Validate FullCourt Standard Table Values
- Identify Gaps in Standard Values
- Unique Court Table Setups
- MACDC Scanning Recommendations
 - FullCourt Document Filing Types
- Review Records Retention Schedule

1:00 p.m.

Review and Prioritize Modification Requests

- Add Alias Name to Name Index Report (ALL REPORTS)
- Add Alias Name to Judgment Window
- Addition of Department Number Data Field
- Department Number to Web Page Format Calendar (ALL CALENDARS)
- Inactivate Renumber Docs Button on ROA Window
- Change to ROA Sort Option
- Allow Option to Default to Docs only ROA Window
- Change to Search Function of ROA Window
- Enhanced Hearing Prioritization – add user-defined numeric scheduling prioritization.
- Hot Key to Physical File
- Allow Alternative Charging Statutes and Modifiers to be entered
- Change to Criminal Disposition Report
- Change to Miscellaneous Receipt
- Change to Media Disposition Report – not include DOB

3:00 p.m.

Change Control Management Procedures

- Review existing procedure
- Identify Gaps
- Identify changes in approach